

# Oracle Energy and Water Customer Edge Conference 2023

March 12-14, 2023

## Opower Customer Engagement & Decarbonization Agenda

Sponsored by:



### Sunday, March 12, 2023

TIME (PST)	TRACK	LOCATION
1:00pm – 6:00pm	<b>Registration</b>	Palm Foyer

### Monday, March 13, 2023

TIME (PST)	TRACK	LOCATION
6:45am – 5:00pm	<b>Registration</b>	Palm Foyer
7:30am – 8:30am	<b>Breakfast</b>	Seaport Ballroom
8:30am – 10:30am	<b>General Session:</b> Welcome to Customer Edge! We'll begin each day together in general sessions designed to ignite your spark and get ready for the day ahead. Day one we'll kick off with our SoCal industry leader panel and hear from local utilities about how they're driving sustainability and reliability programs while serving their communities. Then we'll hand the mic over to our product leaders who will give you a sneak peek into exciting product updates across our portfolio. Finally, we'll be joined by security experts for a check in on the latest cybersecurity news in the industry.	Seaport Ballroom
10:00am – 5:00pm	<b>Innovation Hub:</b> Meet our Innovation Team! Enjoy immersive experiences that allow you to explore the future of water and energy. We will have virtual reality, augmented reality, model town, interactive self-guided demos, and much more!	Seaport Foyer

<p>10:45am – 12:00pm</p>	<p><b>Opower Vision and Roadmap</b></p> <p>Hear from Opower executives about the Oracle Opower vision and product strategy for helping utilities tackle business challenges and achieve their net-zero targets. Come see the customer experience the Opower team is creating for everyone you serve. It needs to be simple, motivating, and satisfying. It needs to be powered by artificial intelligence, automated by SaaS technology, and influenced by behavioral science. It needs to deliver measurable decarbonization results and customer lifetime value.</p> <p><b>Presenters:</b> <i>Matt O'Keefe, GVP and Head of Opower &amp; Natalie Musick, Head of Product, Opower</i></p>	<p>Gaslamp AB</p>
<p>12:00pm – 1:00pm</p>	<p><b>Lunch</b></p>	<p>Harbor Ballroom</p>
<p>1:00pm – 1:50pm</p>	<p><b>Unlocking the Clean Energy Future through Customer Data Access: Opportunity &amp; Approach</b></p> <p>In order for states, cities, and energy providers to meet the challenge (and in many cases mandates) to reduce carbon emissions now and going forward, the issue of easy access to energy usage data must be solved and treated as a fundamental piece of our clean energy infrastructure future.</p> <p>Our panel presentation and discussion will focus on the importance of energy data to spur the required investment in our sector to scale rapidly and the need for easy, equitable access to the information for all. We will explore common concerns around privacy, security, and technical implementation from the perspective of two of the nation's leading utilities along with the pioneering approach being taken by UtilityAPI in partnership with Opower to create this network in the most rapid and cost-effective manner possible.</p> <p><b>Presenters:</b> <i>Devin Hampton, CEO UtilityAPI, Michael Weinstein, Solution Line Owner, American Electric Power</i></p>	<p>Gaslamp AB</p>
<p>2:00pm – 2:50pm</p>	<p><b>Accelerating Behavioral Change Beyond the Home Energy Report</b></p> <p>Behavioral Energy Efficiency programs have relied mainly on the Home Energy Report's monthly communications to deliver results. Now, with evolving technologies and new program expectations for success, you have to leverage the power of behavior change to ensure customers adopt, engage and take action in new and potentially challenging ways. During this session, we will share why Behavioral Energy Efficiency is about more than just delivering the Home Energy Report and how the SaaS platform powering your behavioral program can flex to quickly meet specific needs for peak reduction, program enrollment, electrification, and rate adoption. We'll discuss our introduction of dynamic communications that flex to quickly</p>	<p>Gaslamp AB</p>

	<p>meet specific needs.</p> <p><b>Customer Speakers:</b> <i>Will Batista, Manager Sustainability &amp; Energy Efficiency, Southwest Gas; Karen Wheatley, Sr. Energy Efficiency Program Manager, PECO an Exelon Company &amp; Kerri Carnes, Director, Customer to Grid Solutions at Arizona Public Service</i></p> <p><b>Presenters:</b> <i>Lisa Farley, Director of Client Success; Melissa Leymon, Senior Manager, Product Strategy, Oracle</i></p>	
2:50pm – 3:10pm	<b>Break</b>	
3:10pm – 4:00pm Oracle Uncovered Discovery Track	<p><b>Welcome to the Community!</b></p> <p>Join this session to discover Oracle Energy and Water's mission and vision, future goals, input from our user groups, &amp; an overview of our offered solutions and how they connect. Plus, gain insight into our exclusive customer-only resources such as our quarterly newsletter, onboarding expectations, &amp; more!</p> <p><b>Presenters:</b> <i>Kari Beasley, Sr. Director, R&amp;D Program Management, Reid Davis, Senior Manager, Customer Success Team, &amp; Robert Walters, Principal Project Manager at Exelon- representing the Oracle Utilities User Group MDM Group</i></p>	Seaport F
3:10pm – 4:00pm Interactive Workshop	<p><b>Driving Productive Self-Serve Customer Engagement with Mobile Wallets with ACI Worldwide</b></p> <p>Consumers run their life from their phone and look for efficient, secure, self-serve interactive experiences. Join this workshop to hear how Southern Company Gas partnered with ACI Worldwide to leverage Apple/Google wallets to create a frictionless billing and payment experience that resulted in meaningful cost reduction, customer satisfaction and self-service. See for yourself as we discuss ways utilities can light up customer phones with timely account and critical service alerts to shift engagement to digital channels and reduce inbound call volume.</p> <p><b>Presenters:</b> <i>Joseph Frumento, Sr. Solution Consultant, ACI Worldwide and Sonia M. McCollum, Manager Digital CX, Southern Company Gas</i></p>	Seaport GH
3:10pm – 4:00pm Changemakers Discovery Track	<p><b>Choose Your Own Adventure: New Product Innovation Showcase</b></p> <p>Wondering what our incubator team is up to? Want to talk about what's next on the analytics frontier? Join us for this product exploration session. You'll get the chance to pick 2 poster sessions to hear the latest from our top innovators and ask your questions.</p> <p><b>Topics to Choose From:</b></p> <p><b>Topics to Choose From:</b></p> <p><b>3:10 – 3:25</b></p>	Seaport ABC Gaslamp AB Old Town AB

	<ul style="list-style-type: none"> <li>• Democratization of Data Science: A Self-Service Data Science Platform – Seaport ABC</li> <li>• Accessing energy insights across all consumer apps – Gaslamp AB</li> <li>• Autonomous Grid Edge Resiliency – Old Town AB</li> </ul> <p><b>3:30 – 3:50</b></p> <ul style="list-style-type: none"> <li>• Connecting your world of data: A new paradigm of bringing app data together – Seaport ABC</li> <li>• Exploring water digital twins – Old Town AB</li> </ul> <p><b>Topic Leaders:</b> Jason Kriendler, Director Product Management; Erik Hobbie, Director Incubator Management; Jason Duncan-Wilson, Senior Director Product Incubator; Kojo Quaye, Senior Manager Product Strategy and Marketing; Brad Williams, Vice President Industry Strategy; Mike Ballard, Vice President of Industry Strategy and Innovation</p>	
3:10pm – 4:00pm Changemakers Discovery Track	<p><b>Distributed Energy: Turning consumers and their devices into dispatchable grid resources</b></p> <p>Join this session to explore how we can take demand flexibility to the next level with distributed energy resource management. In this session, we'll dive into the powerful benefits for you and your customers when you can tap into devices across the grid. We'll discuss the new frontier of reliable, safe grid management, and how a comprehensive strategy for today's intelligent, dynamic grid can help you orchestrate energy demands and generation, control devices across the network, and develop localized energy markets.</p> <p><b>Presenters:</b> Melissa Leymon, Senior Manager, Product Strategy &amp; Marketing; Sameer Kalra, Director of Operational Technology Products and Chona Emerson, Consulting Sales Solution Architect</p>	Balboa ABC
4:10pm – 5:00pm Oracle Uncovered Discovery Track	<p><b>Meet the Leadership Team</b></p> <p>Join this session to meet the executives of Oracle Energy &amp; Water. This session is an opportunity for customers and prospects to ask their most burning Oracle Energy &amp; Water questions and hear insights from our executive leaders.</p> <p><b>Oracle Energy and Water Executive Leaders:</b>  Hillary Martin, Vice President Product Strategy &amp; Marketing  Dave DeMaio, Senior Vice President  Steve Heilig, GVP, Product Development  Vanessa Richter, Vice President of Sales, Opower  Hafid Elabdellaoui, VP Cybersecurity</p>	Seaport F
4:10pm – 5:00pm	<p><b>Ask Us Anything: Cloud, Tech, Integration, and More</b></p> <p>This session is an opportunity for members from Cloud &amp; Tech to answer questions from previous sessions that they lead and audience members want to learn more, ask questions, or discuss opportunities. This session will be an open area where people can come and go as they please instead of staying after in session rooms to prevent delay of other sessions. This was a request from the cloud &amp; tech team.</p>	Gaslamp AB

	<p>This is the free time for cloud and tech to answer any and all questions.</p> <p><b>Presenters:</b> <i>Patti Costello Delivery Director, AMER Customer Solutions, Lynda Elmer Senior Director, NA Customer Solutions Delivery, Chona Emerson, Consulting Sales Solution Architect, John Eschmann, Consulting Sales Solution Architect</i></p>	
<p>4:10pm – 5:00pm Oracle Uncovered Discovery Track</p>	<p><b>Your Multi-Cloud approach with Oracle Cloud Infrastructure</b> Educate and engage the audience on Oracle Cloud Infrastructure and how we complement a multi-cloud strategy</p> <p><b>Presenters:</b> <i>Jim Fisher, GVP of Cloud Sales, NACT Energy &amp; Utilities, Jay Heglar, Senior Vice President Strategy &amp; Business Development</i></p>	Gaslamp CD
<p>4:10pm – 5:00pm Interactive Workshops</p>	<p><b>Addressing Barriers to SaaS Transformation (Cloud)</b> Understand the most observed barriers to SaaS Operational Success and the Operational Readiness Activities that can help mitigate. We all want a smoother transition to SaaS Live Operate and to achieve defined Outcomes. Discover what to expect in Live Operate and how your success starts before go-live, a breakdown of roles and responsibilities of You (customer), DevOps, CSM and how Oracle Energy &amp; Water Integrated Managed Services can help!</p> <p><b>Presenter:</b> <i>Greg Terpstra, Sr Director, Oracle Global UIMS Delivery</i></p>	Seaport GH
<p>4:10pm – 5:00pm Changemakers Discovery Track – option 1</p>	<p><b>Water is Life: Protecting our most precious resource</b> Water is critical to all life, the world's water stewards (yes, you!) are faced with increasingly complex challenges - from aging infrastructure and led pipe replacement to extreme drought and everything in between. Join this discussion with water experts to talk about how technology can help us solve some of today's biggest water challenges.</p> <p><b>Presenters:</b> <i>Maria DeChellis, Sr. Director Solution Consulting; Julie Waechter, Interim CEO, DigDeep; Rachel Brown, Senior Advisor to the Assistant Secretary - Policy, Management, and Budget, US Department of the Interior</i></p>	Balboa ABC
<p>4:10pm – 5:00pm Changemakers Discovery Track – option 2</p>	<p><b>Decarbonization and Equitable Energy Transformation</b> As we drive energy efficiency and demand flexibility programs, as we promote electrification initiatives and more distributed energy resources across the grid, we must also ensure the burden of energy transformation is not disproportionately borne by vulnerable customer groups. In this engaging discussion, we'll tackle a question of critical importance: how do we ensure our energy systems are equitable as we push to achieve sustainability targets?</p> <p><b>Presenters:</b> <i>Jameela Belyeu, Senior Manager Product Strategy &amp; Marketing; Julia Friedman, Director Regulatory Affairs and Market Development</i></p>	Old Town AB

<p>4:10pm – 5:00pm Changemakers Discovery Track</p>	<p><b>AEP's Agent Desktop Initiative: “Change Making” to Address Business and Technology Challenges, both Historical and Current</b></p> <p>Years ago, AEP launched an in-house user interface to provide its call center agents a way to execute common CIS functions quickly and efficiently and in a manner that supported the ability of agents to comply with business rules for seven (7) different operating companies working in eleven (11) different states. As AEP embarks on its journey to replace its older mainframe CIS system with an Oracle solution, it still needs its agents to handle customer interactions efficiently in this same complex regulatory environment. In the second half of 2022, AEP launched an effort to determine which existing Commercial, Off-the-Shelf (COTS) software solutions could be integrated with the new Oracle CIS and other systems to support call center agent efficiency, the complicated regulatory environment, and increased expectations regarding Customer Experience (CX) capabilities.</p> <p><b>Presenters:</b> Alec O'Brien, TMG Consulting; Amy Jones, AEP; Julie Standley, AEP</p>	<p>La Jolla AB</p>
<p>5:15pm – 7:30pm</p>	<p><b>Edge Reception: Join us on the Pool Deck and immerse yourself in the San Diego culture! This will be an amazing evening filled with plenty of food and drinks. Dress casual!</b></p> <ul style="list-style-type: none"> <li>• After a long day of conference sessions, don't you just want to chill and grab a drink? <b>PwC</b> is making this possible at their local craft beer station.</li> <li>• <b>Accenture</b> is hosting a BEACH THEME Watercolor Postcard station where you'll receive a memorable souvenir from the event</li> <li>• Join <b>Deloitte</b> and get a speedy caricature of yourself – you will be able to wear this with your event lanyard to show folks what a true “character” you are</li> <li>• <b>KPMG</b> welcomes you to enjoy a special cocktail at their mixology station – slide over for an “Electric Lemonade” or perhaps a “Turbo-Tini”</li> <li>• While you're enjoy the reception, take a photo at the roaming photo booth and capture this experience with a digital memory – thanks to <b>Infosys</b></li> </ul>	<p>Level 4</p>

**Tuesday, March 14, 2023**

TIME (PST)	TRACK	LOCATION
6:30am – 7:15am	<b>Yoga Session</b>	Hillcrest CD
7:00am – 2:00pm	<b>Registration</b>	Palm Foyer

7:30am – 8:30am	<b>Breakfast</b>	Seaport Ballroom
8:30am – 10:30am	<b>General Session:</b> Are you ready for day two? Our second day of Customer Edge is all about innovation. We'll start off with a bang as we announce and celebrate this year's Changemaker Award winners. We'll then be joined by Oracle leaders to discuss the future of technology as we see it and showcase some exciting projects that are exploring the limits of what's possible in the industry. And finally, we are thrilled to have Josh Linkner, world-renowned innovation expert, join us for some creative troublemaking to leave you buzzing and ready to drive industry transformation.	Seaport Ballroom
10:00am – 5:00pm	<b>Innovation Hub:</b> Meet our Innovation Team! Enjoy immersive experiences that allow you to explore the future of water and energy. We will have virtual reality, augmented reality, model town, interactive self-guided demos, and much more!	Seaport Foyer
10:45am – 12:00pm	<b>A customer-centric approach to making energy affordable for the most vulnerable customers</b> Rising costs for everyday resources put millions of limited-income customers at a disadvantage and adds to the energy burden they already face. In this session, we will talk about why it benefits utilities to reach their most vulnerable customers and the need for funding collaboration, shared tools, and a better customer experience. We'll dive into how utilities can help ease the energy burden through a unique process of identifying, reaching and increasing customer enrollment in meaningful programs that help reduce arrearages and reach customers at scale more economically. <b>Presenters:</b> <i>Jameela Belyeu, Senior Manager, Product Strategy &amp; Ryan Irwin-Klausmeier, Director of Product Management</i>	Gaslamp AB
12:00pm – 1:00pm	<b>Lunch</b>	Harbor Ballroom
1:00pm – 1:50pm	<b>Delivering an empowering energy management experience for business customers</b> Utilities' business customers are expecting seamless experiences with clear data and insights at their fingertips. Opower is helping utilities take a step forward with a new Business Customer Engagement solution with a flexible suite of cross-channel experiences designed for business customers and utility account managers. Using personalized self-service tools and outbound messaging and alerts, Opower helps to enhance customer satisfaction, reduce cost-to-serve, and make account managers more effective.  Join this session to learn more about how we're doing that. Hear from clients who have or will soon launch this solution	Gaslamp AB

	<p>about the value its driving with their customers.</p> <p><b>Presenters:</b> <i>James Giampietro, Principal, Product Strategy &amp; Lonny Blumenthal, Group Product Manager</i></p>	
1:50pm -2:10pm	<b>Break</b>	
2:10pm -3:00pm Oracle Uncovered Discovery Track	<p><b>SaaS Transformation Mindset - Supporting your journey to the cloud</b></p> <p>Join this session to learn more about the breakdown of roles and responsibilities, the guided learning paths available and what you should expect from your system integrators and project teams during implementation and after go-live. We'll dive deep into the differences between on premise and SaaS, mapping a clear migration plan, stakeholder management, tools and support available, and more.</p> <p><b>Presenters:</b> <i>Manpreet Hundal, Sr. Director Enablement, Rochelle Cister, Consulting Customer Solutions Director, Calvin Tu, Senior Director, Utilities Cloud Solutions and Brian Michel, Director, Product Management, Oracle</i></p>	Seaport F
2:10pm -3:00pm Interactive Workshops	<p><b>Peer Panel: Innovation in affordability, community programs, and external partnerships</b></p> <p>Yesterday's programs for assistance consisted of payment arrangements, budget billing, or perhaps a reduced rate. Today, utilities are creating innovative new programs where renewable energy programs are piloting homes for low-income communities, public-private partnerships are being designed helping small commercial organizations, and new community organizations are engaging with utilities to help in alternate ways such as plumbing and energy efficiency repairs. Learn about what your peers are doing, ask questions, and bring home some new ideas.</p> <p><b>Presenters:</b> <i>Chimaobi C. Chijioke, VP Customer Services, Georgia Power; Antoine Tilmon, VP Customer Operations NV Energy – BHE along with Maria DeChellis, Sr. Director Solution Consulting, Oracle</i></p>	Seaport GH
2:10pm -3:00pm Changemakers Discovery Track	<p><b>Oracle Ignite Kick Off: Demystifying Next Gen Tech</b></p> <p>Roll up your sleeves and put your thinking caps on...it's time to dive in. Tuesday afternoon we invite you all to join the Oracle Ignite Series, during which you will join teams to develop and pitch innovative solutions to real-world problems using next generation tech. In true Ignite fashion, all presentations will be 20 slides, in just 5 minutes, with slides automatically advancing after 15 seconds. Quick, powerful, and a whole lot of fun!</p> <p><b>Ignite Kick Off:</b> Let's get started in our Ignite Series by exploring technologies that could have big implications for the industry. Four experts will each be challenged to deliver a 5 minute Ignite-style session laying out their chosen</p>	Seaport A-E



	<p>technology. Their goal: convince you to join their team for the next phase of the Ignite Series.</p> <p><b>Ignite Leaders:</b> <i>Caitlin Aburrow, Senior Director Global Product Marketing; Jason Duncan-Wilson, Senior Director Product Incubator; Jason Strautman, VP Data Science &amp; Analytics Engineering; Jack Lucy, Master Principal Sales Consultant; Paul Hesby, Senior Solution Manager; Ashish Agarwal, Director Utility Innovation Lab and Burcin Kaplanoglu, VP Oracle Industry Labs</i></p>	
<p>3:10pm – 4:00pm Oracle Uncovered Discovery Track</p>	<p><b>Personalized CX: Opower insights in your CRM, marketing, and trusted partner apps</b></p> <p>See what bringing Opower customer analytics and insights into your CRM and Marketing Automation Systems can do for customer operations. Learn how extending single sign on capabilities to your trusted partner applications simplifies the customer journey and accelerates program enrollment. In this session, we'll have a dialog and showcase how to create an easier path to data sharing, insights, and customization across all your customer solutions.</p> <p><b>Presenters:</b> <i>Kojo Quaye, Senior Manager, Product Strategy &amp; Darshini Thiagarajan, Group Product Manager</i></p>	<p>Seaport F</p>
<p>3:10pm – 4:00pm Interactive Workshops</p>	<p><b>"Water" you building with your AMI program</b></p> <p>Whether you are starting your AMI program or you have been on it for a while, are you building a smart-scape of data? We will discuss uses of the AMI program beyond customer leak detection or water conservation, including financial reporting, redesigning job descriptions, reevaluating management reports and training, and how your peers are solving everyday issues in water with their AMI data.</p> <p><b>Presenters:</b> <i>Tarja Nummela, Customer Service Director, City of Tempe, Denis Demera, Customer Care &amp; Field Service Manager, LVVWD along with Maria DeChellis, Sr. Director Solution Consulting, Oracle</i></p>	<p>Seaport GH</p>
<p>3:10pm – 4:00pm Changemakers Discovery Track</p>	<p><b>Oracle Ignite: Pitch Workshops</b></p> <p>Choose which next gen technology team you'd like to join in this hands-on workshop. Bring your big ideas as you and your team develop a pitch: how would you apply your next gen technology to solve a big, hairy industry challenge?</p> <p><b>Ignite Leaders:</b> <i>Caitlin Aburrow, Senior Director Global Product Marketing; Jason Duncan-Wilson, Senior Director Product Incubator; Jason Strautman, VP Data Science &amp; Analytics Engineering; Jack Lucy, Master Principal Sales Consultant; Paul Hesby, Senior Solution Manager; Ashish Agarwal, Director Utility Innovation Lab and Burcin Kaplanoglu, VP Oracle Industry Labs</i></p>	<p>Seaport A-E</p>
<p>4:10pm – 5:00pm</p>	<p><b>Oracle Ignite Finale: Pitch It!</b></p> <p>Ready, set, pitch! In this Ignite Series Finale your team will</p>	<p>Seaport Ballroom</p>

pitch your big idea. We'll poll the audience to crown one team as winner. Who will claim the coveted first place prize package? (Hint: it includes a discount for next year's Customer Edge!)

**Oracle Ignite Leaders** along with *Hillary Martin, VP Strategy and Marketing and David De Maio, SVP, Oracle and Caitlin Aburrow, Senior Director Global Product Marketing*